12/2/83
A2500-2

Paper Paperboard & Wood Pulp

MONTHLY STATISTICAL SUMMARY - Vol. 61 - No. 11 NOVEMBER, 1983

New High in Paper and Paperboard Production

The production of paper and paperboard in October 1983 rose to an estimated 5.8 million tons, 12% above the October 1982 level and a new monthly high. Paper production, at 2.94 million tons in October was 10% above its year-ago level; paperboard production, at 2.89 million tons in October was 15% over its year-ago level. Both established new monthly highs.

The October trend level of production (the average of the September and October seasonally adjusted annual rates) was at a record 68.2 million tons per year, with paper at 34.3 million tons and paperboard 33.9 million tons per year. If these rates hold for the remainder of the year, the 1983 total for paper and paperboard production would be in the neighborhood of 64.6 million tons, with paper at 32.8 million tons and paperboard 31.8 million tons. This would put paper 6% above the previous high established in 1981, and 8% above the 1982 recession level. Paperboard would be 2% above its 1981 high, and 9% above 1982.

The stronger upward thrust in paper production largely reflects the strength in printing and writing grades that has been evident during the past three years. The 1983 level of production of these grades is pointing to 17.3 million tons, 10% over the 1981 high.

The gains in printing and writing paper production reflect strength in virtually all major markets and grades. The table on page 3 shows gains over the 1981-1982 levels well in excess of 10% in the coated paper and uncoated free sheet paper grades. These are supported by the 10% plus gains in shipments to magazine publishers, in bond papers (used largely for computer printout papers and other business forms), in office reprographics (mainly office copy paper) and in shipments to commercial printing.

Continued on Page 2

Continued from Page 1

These increases are well above those of the real gross national product and even exceed the gains in industrial production. These large gains bring up the question as to how much is being added to inventories. Although some increase in inventory has obviously taken place, if only to meet the higher levels of white paper consumption, there are no indications that the accumulation has been large. We conclude that a major part of the higher production of printing/writing papers is going directly into consumption by various end-users.

Tissue paper production is also showing significant growth, with the 1983 production total pointing to 4.8 million tons, or 8% above 1982. The 1983 production figure compares to the previous high of 4.5 million tons established in 1979 and again in 1981. Here too the question of possible inventory accumulation can be raised, but there is little evidence of significant increases in inventories.

The packaging and industrial papers, which in the past have shown the slowest growth among the various paper grades, have also shared in the expansion of paper demand, but at more modest rates. Production in the first ten months of the year was 5.5% above the 1982 level and, on a seasonally adjusted basis, about equal to the 1981 level. If the September-October rates of production hold for the remainder of the year, production of these grades will be at 5.55 million tons, which would equal the 1981 total. However, this would still be below the highs reached in the 1977-1979 period.

The sharp decline in industrial production in 1982, contracted the demand for paperboard even more sharply than paper. Similarly, the 1983 gains in production are increasing paperboard production at a more rapid rate than most paper grades. Total paperboard production in the first ten months of 1983, as shown in the table on page 3, was 8.7% above its year-ago level, compared to the 7.5% increase in paper production.

In percentage terms, the largest gains in production are evident in the non-packaging grades. Gypsum wallboard facings, for example, showed a 21% gain over the year-earlier level, during the first ten months of the year, reflecting the large increase in housing activity. The rate of production in the first ten months of the year was about one million tons per year, which was close to the highs reached in the 1977-1979 period. Panelboard

Continued on Page 10

PAPER AND PAPERBOARD STATISTICS

PRODUCTION, SHIPMENTS AND ORDERS
(Thousands of Tons)

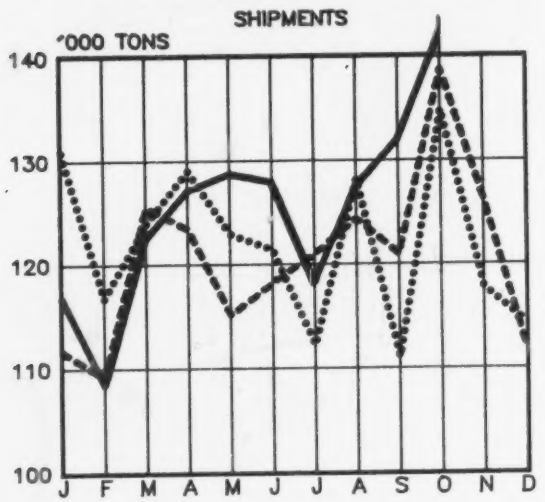
	YEAR 81	YEAR 82	JULY 83	AUG. 83	SEPT 83	OCT. 83	Annual Rate Y-T-D 83	% Change From same Period Last Year
					R	P		
PAPER								
Newsprint - Production	5239	5042	417	458	415	448	5136	0.7
- Shipments	5220	4888	436	457	413	448	5112	2.0
Printing & Writing	15722	15643	1337	1543	1462	1564	17289	10.2
Groundwood Paper - Shipments	1483	1439	118	128	132	142	1502	2.8
- New Orders	1449	1469	135	163	131	150	1577	6.2
- Unfilled Orders	100	91	114	145	151	158	158	58.4
Coated Paper - Shipments	4840	5032	453	536	485	527	5671	12.5
- New Orders	4853	4888	499	556	450	510	5838	16.6
- Unfilled Orders	380	325	524	528	492	477	477	30.5
Unctd Free Sheet - Shipments	7898	7847	652	758	722	787	8676	10.3
- New Orders	7735	7820	755	782	720	725	8648	14.3
- Unfilled Orders	370	321	598	608	610	564	564	78.9
Thin Paper - Shipments	336	323	24	28	26	28	334	1.6
Cotton Fiber Paper - Shipments	125	118	9	11	11	14	127	6.0
Bleached Bristols - Production	960	865	81	82	86	86	980	12.8
Tissue Paper - Production	4518	4438	385	419	397	420	4777	8.0
Total Packaging & Other Paper *	5552	5300	415	514	492	507	5605	5.5
Unbl. Kraft Paper - Shipments	3880	3888	287	348	327	338	3784	3.0
Other Paper - Production *	1672	1812	128	165	165	169	1811	11.3
TOTAL PAPER-Production-UnadJ.	31030	30422	2553	2834	2766	2939	32827	7.5
-Production-S.A.			2748	2821	2875	2939	32850	7.5
PAPERBOARD - PRODUCTION								
Solid Wood Pulp Furnish	24231	22589	1994	2128	2124	2210	24790	8.4
Unbl. Kraft Linerboard (1)	14540	13494	1194	1307	1324	1344	15072	10.5
Production for Export	1887	1931	185	191	199	157	2207	12.2
Other Unbl. Kraft Paperboard	1062	1040	107	87	96	96	1101	1.7
Semichemical Paperboard	4719	4389	388	406	395	423	4713	6.5
Production for Export	155	185	20	21	17	13	211	11.6
Solid Bleached Paperboard	3810	3665	307	329	309	348	3904	5.0
Production for Export	557	525	35	37	37	44	524	-1.6
Recycled Paperboard	7001	6476	569	614	611	678	7227	9.7
Production for Export	24	13	2	1	1	1	23	82.0
TOTAL PAPERBOARD-Prod.-UnadJ.	31232	29065	2563	2743	2735	2888	32017	8.7
- Containerboard Prod.(Dom. Use)	19040	17508	1525	1688	1658	1772	18281	9.1
- Boxboard Prod.(Dom. Use) (2)	5544	5150	427	452	448	498	5474	4.5
- All Other P'bd Prod.(D.U.) (2)	4026	3753	368	373	374	403	4297	12.0
- Total Paperbd Prod. for Export	2622	2654	243	250	254	218	2965	9.8
TOTAL PAPERBOARD PROD. - S.A.			2690	2640	2886	2780	31834	8.7
TOTAL PAPER AND PAPERBOARD								
Production - actual	62262	59488	5117	5576	5501	5827	64844	8.1
Production - S.A.			5438	5461	5742	5819	64283	8.1

(1)Includes all exports of kraft paperboard.
(2)Data for unbl. kraft folding boxboard incl. in All Other P'bd.
* Revised series based on A.P.I. data, beginning January, 1981.

P Preliminary
R Revised
S.A. Seasonally Adjusted

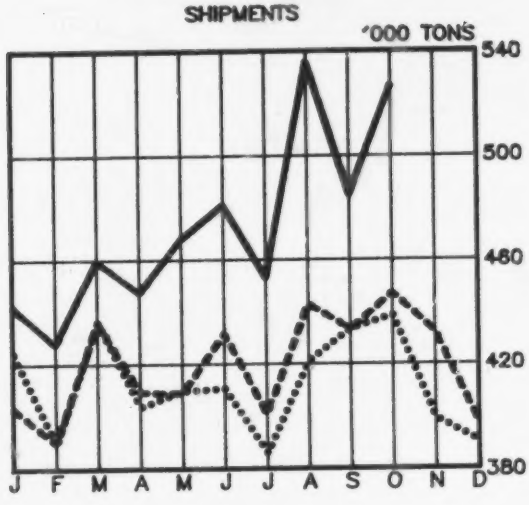
GROUNDWOOD PAPER, UNCOATED

SHIPMENTS



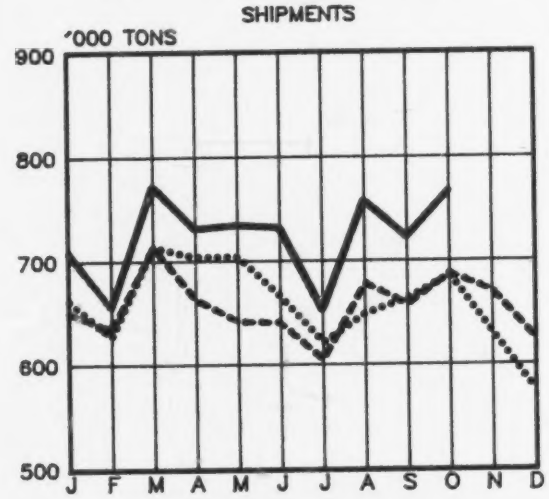
COATED PAPER

SHIPMENTS



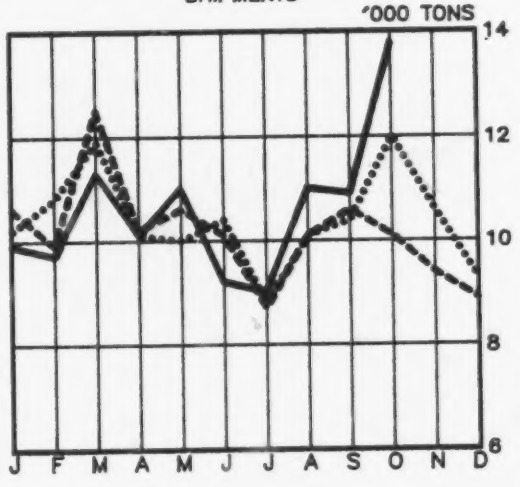
UNCOATED FREE SHEET PAPERS

SHIPMENTS



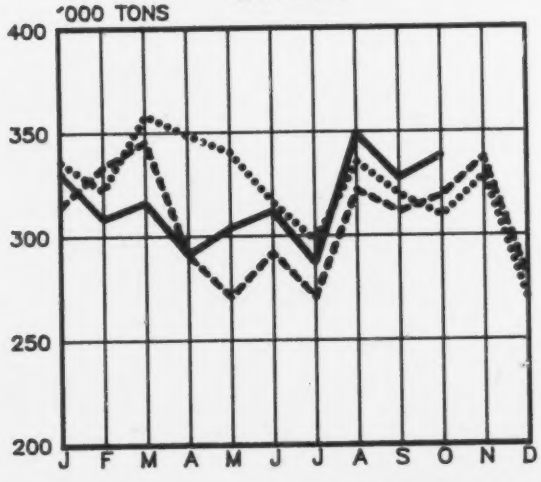
COTTON FIBER PAPER

SHIPMENTS



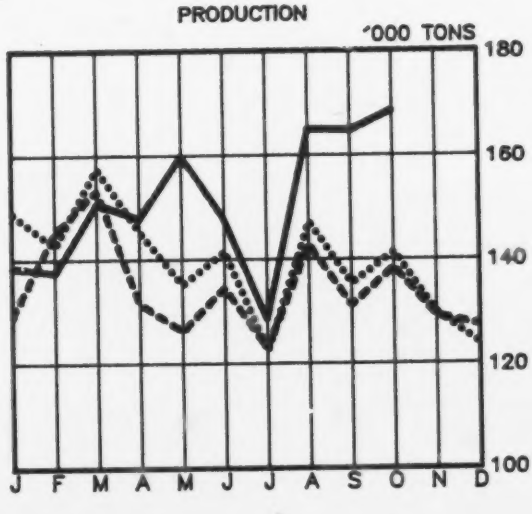
UNBLEACHED KRAFT PACKAGING AND INDUSTRIAL CONVERTING PAPER

SHIPMENTS



OTHER PAPER

PRODUCTION



1981 ••••••• 1982 - - - - 1983 ———

WOOD PULP STATISTICS
(Thousands of Tons)

	YEAR 81	YEAR 82	JUNE 83	JULY 83	AUG. 83 R	SEPT 83 P	Annual Rate Y-T-D 83	% Change from same Period Last Year
TOTAL WOOD PULP								
Total Wood Pulp - Production	52041	49333	4405	4156	4483	4418	52157	4.7
- Imports	4087	3656	357	327	350	332	3841	8.9
- Exports	3678	3395	324	259	289	329	3582	2.6
- New Supply	52450	49594	4438	4225	4544	4422	52507	5.1
Dissolving Pulp - Production	1353	1093	123	72	99	91	1236	11.4
- Imports	249	186	13	21	10	11	198	6.8
- Exports	784	631	50	31	60	30	582	-8.0
- New Supply	818	648	87	62	50	72	852	28.6
Paper Grades - Production	41445	39478	3533	3374	3824	3581	42087	5.6
Chemical Pulp - Imports	3655	3302	328	291	322	306	3572	8.2
- Exports	2870	2736	268	224	227	294	2984	4.2
- New Supply	42230	40043	3582	3441	3719	3593	42706	6.0
Groundwood and - Production	5320	5083	413	401	432	428	5000	-1.8
Thermo-Mech. - Imports	183	167	15	15	17	15	172	5.7
- Exports	24	27	5	3	2	4	48	92.3
- New Supply	5478	5203	423	412	447	438	5126	-2.1
Semi-Chemical - Production	3924	3700	335	309	328	318	3824	1.4
- Imports	0	0						
- Exports	0	0	------	Included	with	Groundwood	Pulp	------
- New Supply	3924	3700	335	309	328	318	3824	1.4
MARKET WOOD PULP								
Total Market - Production	6210	5732	548	493	566	533	6414	10.1
Wood Pulp - Imports	2924	2443	263	233	227	218	2784	17.1
- Exports	3352	3143	321	268	285	281	3446	7.0
- New Supply	5782	5032	490	458	488	470	5763	15.4
Dissolving Pulp - Production	1352	1090	123	72	99	91	1236	11.7
- Imports	241	184	12	22	15	13	203	8.1
- Exports	787	675	85	45	52	47	678	-1.9
- New Supply	806	609	50	48	62	58	761	26.2
Paper Grades - Production	4857	4643	423	420	466	440	5167	9.4
Chemical Pulp - Imports	2634	2202	249	209	210	201	2560	18.8
- Exports	2555	2488	236	223	243	234	2767	9.4
- New Supply	4936	4376	436	406	433	408	4960	14.1
Groundwood Pulp - Production	2	1	1	1	1	1	12	8700.0
and All Other - Imports	48	46	2	2	3	4	31	-29.4
- Exports	10	0	0	0	0	0	0	-50.0
- New Supply	40	46	4	3	4	5	42	-2.6

SOURCES: Total Wood Pulp Production & Market Wood Pulp Production, Imports & Exports - Pulp Division, Pulp, Materials and Technology Group, API. Total Wood Pulp Imports & Exports - Department of Commerce.

FIBROUS RAW MATERIALS
(Thousands of tons)

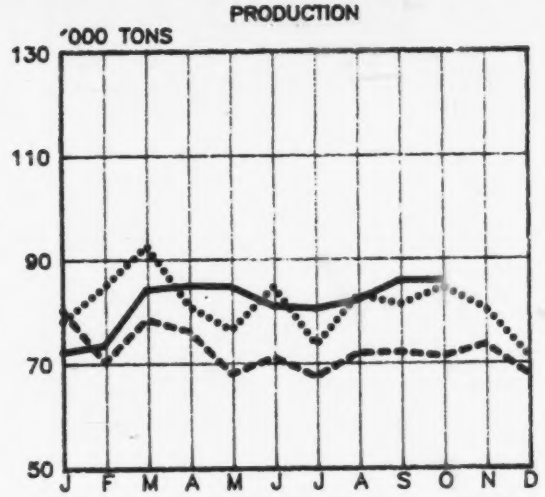
					R	P		
CONSUMPTION AT PAPER & PAPERBOARD MILLS								
Total	64573	61645	5329	5187	5580	5535	64831	4.7
Total Wood Pulp	50698	48120	4324	4059	4375	4347	50738	4.5
Waste Paper	13875	13525	1205	1128	1205	1188	14193	5.4
INVENTORIES								
Own Use Wood Pulp at Pulp Mills	188	177	201	209	212	164	164	-12.4
Market Pulp at Pulp Mills	393	437	425	452	468	442	442	-3.4
Mkt Pulp at Ppr. & Bd. Mills *	454	492	515	499	488	534	534	27.1
Waste Paper at Paper &Bd. Mills	1211	1017	856	854	853	862	862	-14.1
Days of Supply at Pulp Mills of Chemical Paper Grade Mkt Pulp	33	37	30	33	34	31	31	-18.4

SOURCES: Wood Pulp Data, Pulp Division, Pulp, Materials and Technology Group, API. Waste Paper Data, Paper Recycling Committee, API.

* - Census data prior to 1982; P - Preliminary; R - Revised; (0) - Indicates zero to five-hundred short tons

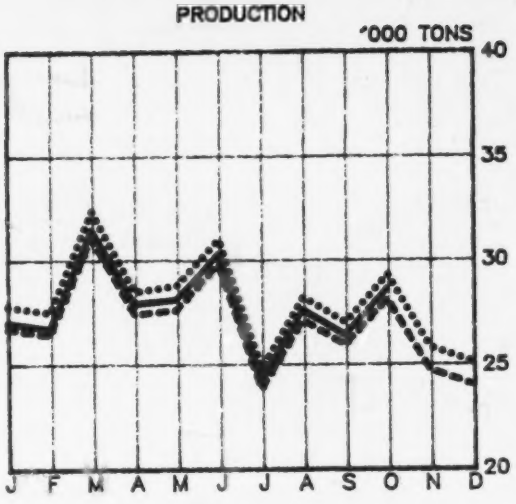
BLEACHED BRISTOLS

PRODUCTION



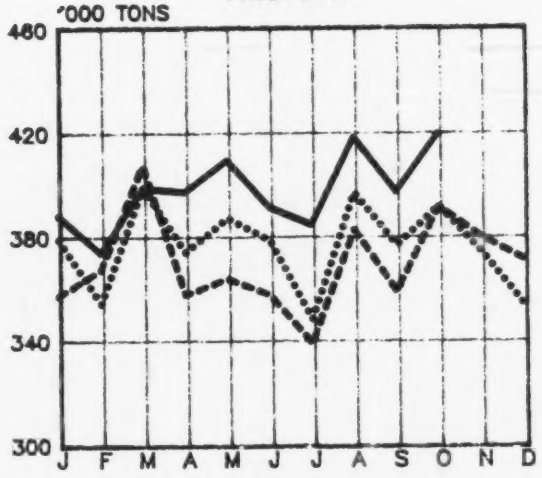
THIN PAPER

PRODUCTION



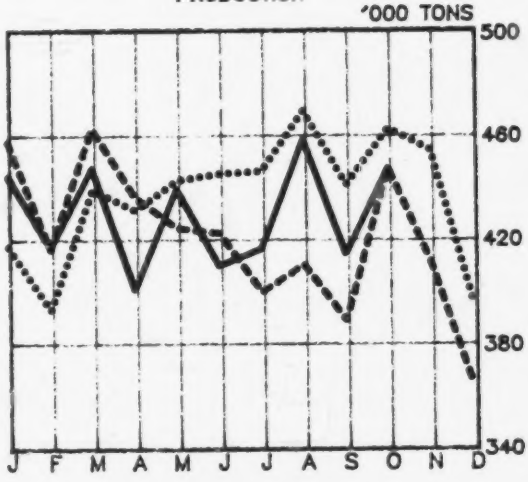
TISSUE PAPER

PRODUCTION



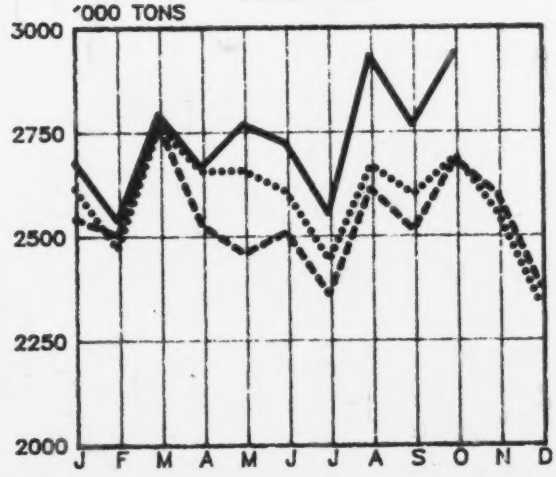
NEWSPRINT

PRODUCTION



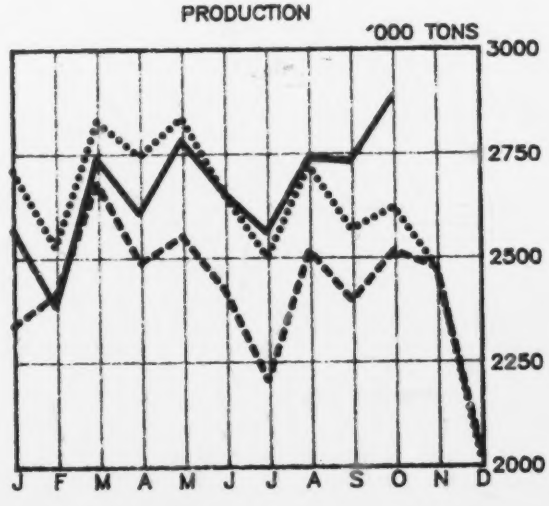
TOTAL PAPER

PRODUCTION



TOTAL PAPERBOARD

PRODUCTION



1981 ••••••• 1982 - - - - - 1983 ———

FIBROUS RAW MATERIALS (Continued)

(Thousands of Standard (128 cubic Feet) Cords)

		YEAR 81	YEAR 82	JUNE 83	JULY 83	AUG. 83	SEPT 83	Annual Rate Y-T-D 83	% Change From same Period Last Year
PULPWOOD									
Total U.S.	- Total Receipts	78547	78519	7154	6821	7445	7286	83983	6.8
	- Total Consumpt.	78747	78039	7188	6801	7385	7203	85200	7.8
	- Residues *	30590	31152	2846	2644	2784	2846	32583	5.8
	- Inventories	6045	5426	4763	4952	5177	5051	5051	-2.2
So. Atlantic	- Total Receipts	24681	23769	2164	2012	2218	2240	25827	9.0
	- Total Consumpt	24815	23725	2115	1983	2198	2250	25848	8.5
	- Residues *	8770	8273	655	621	686	722	7861	-3.0
	- Inventories	1051	1165	1028	1090	1143	1139	1139	13.8
Northeast	- Total Receipts	7803	7283	597	532	642	588	6848	-7.1
	- Total Consumpt	7712	7221	607	550	628	557	7158	-1.9
	- Residues *	1362	1452	107	59	96	103	1147	-18.2
	- Inventories	635	652	439	443	489	504	504	-16.7
South Central	- Total Receipts	27744	26510	2448	2420	2633	2621	28204	10.0
	- Total Consumpt	27687	27153	2484	2366	2527	2486	28107	8.1
	- Residues *	8923	8616	806	771	800	813	9256	8.8
	- Inventories	1825	1346	1203	1259	1308	1420	1420	6.3
North Central	- Total Receipts	5850	5801	535	514	523	524	6240	13.1
	- Total Consumpt	5708	5706	541	499	522	514	6327	11.2
	- Residues *	1439	1517	150	140	147	151	1800	27.7
	- Inventories	1106	925	797	805	833	851	851	1.1
West	- Total Receipts	13669	15358	1410	1343	1428	1313	15975	3.1
	- Total Consumpt	13825	15234	1441	1403	1519	1396	16759	10.5
	- Residues *	10098	11294	1128	1053	1055	1057	12519	10.3
	- Inventories	1428	1338	1298	1355	1424	1137	1137	-17.5

* - Consumption of Residues in Cord Equivalents. SOURCE: American Pulpwood Association

UNITED STATES TRADE WITH CANADA

IMPORTS FROM CANADA

	YEAR 82 Tons	YEAR 82 $000	AUG. 83 Tons	AUG. 83 $000	SEPT 83 Tons	SEPT 83 $000	Annual Rate Y-T-D 83	% Change From same Period Last Year
Pulpwood, Roundwood (in cords of 128 cubic feet)	87043	4711	11218	499	12461	565	107120	15.2
Pulpwood Chips	1678793	51374	166118	4001	208761	5082	2021107	15.9
Wood Pulp, Total	3364194	1386688	344753	123999	326653	118465	3835565	7.8
Waste Fibrous Materials, Total	129749	23299	15425	2517	12124	1872	156461	20.2
Paper, Board & Products,Total	7707948	3272224	712442	283758	673784	280011	8106886	6.4
Paper, Paperboard,Wet Machine Bd. & Constr. Paper & Bd.	7665489	3201221	707895	285649	668735	270934	8055707	6.3
Paper Paperboard & Products	7327112	3192595	671779	284934	630676	270420	7850705	5.7
Paper & Paperboard, Only	7284863	3121592	667231	276825	625626	261342	7589527	5.8
Paper, Total	7171243	3083475	655950	274038	608883	257040	7446008	4.9
Newsprint	6484605	2730258	577557	233875	537352	219587	6679180	3.6
Printing,Writing & Rel.Par.	612760	310154	69993	35419	60343	31010	673626	17.7
Pack. & Ind. Conv. Paper	66300	46080	7177	3777	9772	5188	79910	18.3
Special Industrial Paper	1899	3123	181	308	375	609	2841	60.9
Tissue Paper	5680	3882	1041	660	1041	687	10451	78.5
Paperboard, Total	113420	28117	11281	2788	16743	4303	153518	52.3
Convtd Paper&Paperbd Products	42449	71003	4547	8109	5049	9077	51179	21.0
Wet Machine Board	1302	737	180	115	196	127	3071	169.1
Construction Paper & Board	379533	78892	40483	8705	42913	9464	453109	20.5

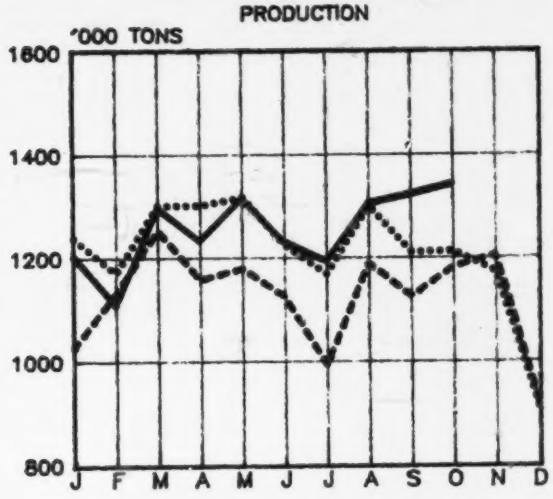
EXPORTS TO CANADA

Pulpwood, Roundwood (in cords of 128 cubic feet)	107700	7263	4091	283	9637	700	61841	-44.8
Pulpwood Chips	27650	1500	2138	88	2355	108	37787	53.7
Wood Pulp, Total	116067	54691	9187	4152	10321	4657	132907	16.5
Cotton Pulp & Other Pulp	6790	4152	567	247	678	426	9024	43.7
Waste Paper	271395	32535	33198	3800	30248	3587	340471	33.9
Paper, Board & Products,Total	583206	442437	57770	41904	56908	41401	654206	24.4
Paper, Paperboard, Wet Machine Bd. & Constr. Paper & Board	383588	275107	37827	26783	37869	27333	450808	23.8
Paper, Paperboard & Products	561355	433689	55155	40880	54420	40368	621654	23.4
Paper & Paperboard, Only	361714	266359	35212	25859	35381	26300	418356	22.2
Paper, Total	188370	185357	18709	18132	19226	18680	230758	26.4
Newsprint	3037	2871	315	305	387	527	4329	49.4
Printing,Writing & Rel.Par.	113443	85899	10805	9074	10835	8945	123711	14.0
Pack. & Ind. Conv. Paper	20289	13815	3128	1914	2788	1839	32207	67.7
Special Industrial Paper	47736	70111	4177	6571	4486	7311	66483	37.3
Tissue	3864	3062	284	268	532	259	4028	15.7
Paperboard, Total	173345	81001	16503	7727	16156	7820	187597	17.3
Convtd Paper&Paperbd Products	199840	167330	19844	15121	19039	14068	203298	26.0
Wet Machine Board	4365	2537	243	144	306	199	5521	14.2
Construction Par & Bd. E	17487	8212	2372	781	2181	833	27031	54.7

SOURCE: Bureau of Census, Department of Commerce. E - Estimate of tonnage based on square foot data

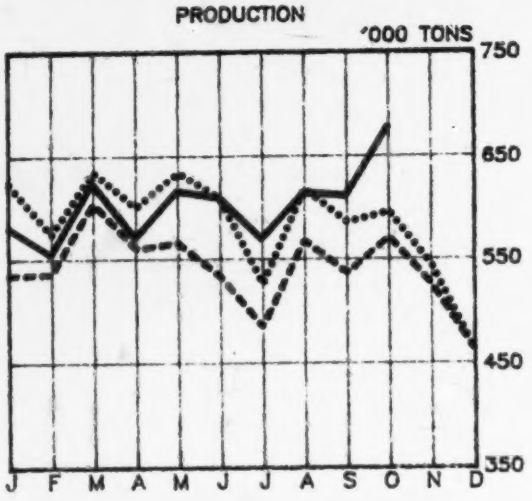
UNBLEACHED KRAFT LINERBOARD

PRODUCTION



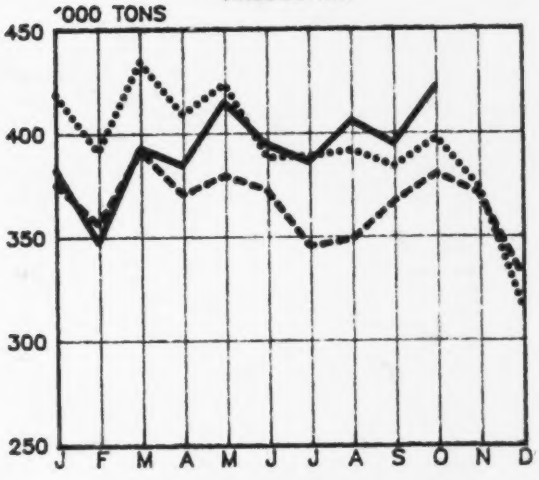
RECYCLED PAPERBOARD

PRODUCTION



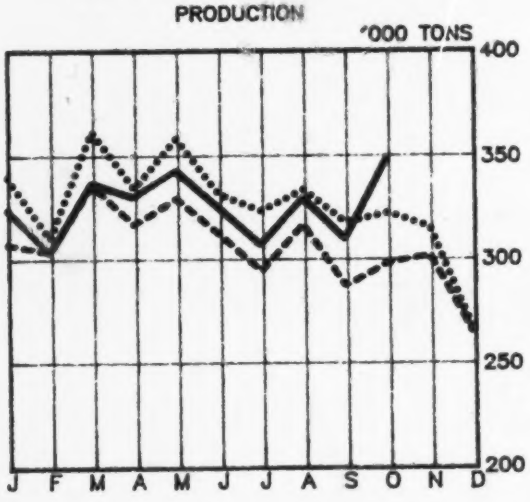
SEMICHEMICAL PAPERBOARD

PRODUCTION



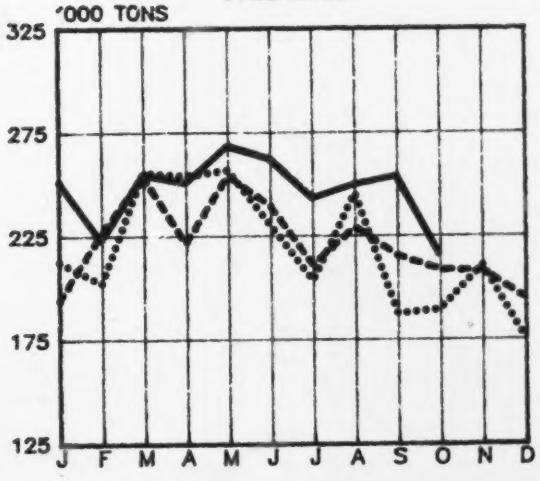
SOLID BLEACHED PAPERBOARD

PRODUCTION



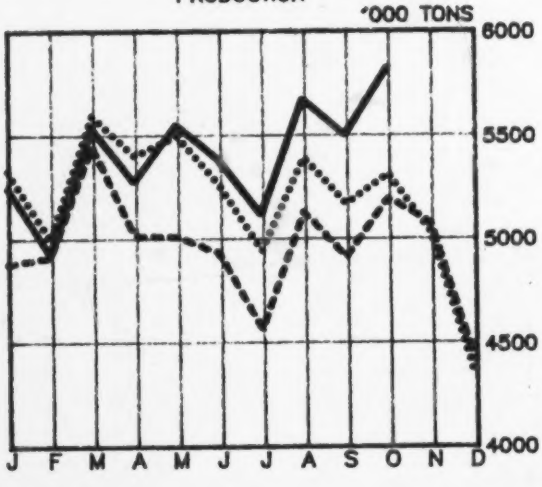
PAPERBOARD FOR EXPORT

PRODUCTION



TOTAL PAPER AND PAPERBOARD

PRODUCTION



1981 ..... 1982 - - - - 1983 ——

PULP PAPER AND PAPERBOARD IMPORTS AND EXPORTS DATA

IMPORTS

	YEAR Tons	82 $000	AUG. Tons	83 $000	SEPT Tons	83 $000	(1) Annual Rate Y-T-D 83	% Change From same Period Last Year
Pulpwood Roundwood (cords)	87043	4711	11218	488	12481	585	107120	15.2
Pulpwood Chips	1682414	51538	166135	4005	208773	5084	2026745	15.8
Total All Imports	11824303	5208303	1132800	475808	1088374	458807	12803723	9.4
Wood Pulp Total	3655786	1493241	348629	125748	332082	120222	3941358	8.8
Waste Paper	74332	9450	11035	1277	8115	807	100357	36.0
Other Fibrous Materials	70176	24212	5286	1808	4717	1654	68324	-8.3
Paper Board & Products Total	8024008	3682401	766950	346871	741460	337123	8695683	9.5
Paper Paperboard Wet Machine Bd. & Construction Paper & Board	7917418	3344205	753640	307881	728283	300890	8554587	8.2
Paper Prbd & Prds. ex Cnst&WMB	7602651	3594201	720502	336517	694727	326601	8191543	8.9
Paper & Paperboard Only	7486060	3256005	707193	287306	681581	290468	8050828	8.5
Paper Total	7361252	3226307	684988	283925	664202	285748	7887479	7.8
Newsprint	6530676	2748852	584131	235863	543241	222273	6746044	3.7
Printing & Writing	784095	408551	101008	51815	107875	55031	1026021	41.8
Uncoated Groundwood	514882	248196	63765	29313	72488	32851	676213	39.7
Uncoated Book	142628	80105	13690	7830	12236	7496	140810	-0.2
Coated Print.& Impres. Par	69010	46763	15314	9472	13975	8618	131633	108.2
Bristols	391	416	20	37	47	52	350	7.1
Writing and Similar Paper	25883	19225	7108	4138	7894	4552	62843	158.8
Thin (except Cigarette)	11293	13848	1111	1125	1438	1382	14273	33.1
Total Pkg & Other Paper	79853	63863	8726	5378	12002	7714	104203	30.7
Unbleached Kraft Paper	23078	10749	3869	1840	5731	2187	40758	87.5
Other Pkg. & Indust. Paper	56575	53114	4857	3740	6271	5517	63444	9.4
Tissue	6828	5241	1120	788	1085	732	11210	39.3
Paperboard, Total	114808	29898	12207	3331	17358	4718	163349	59.8
Test or Containerboard	35983	8459	3622	972	3827	1123	48222	63.8
Semi-Chemical Corrugating	47295	9879	4854	1110	7933	1840	64516	49.7
Other Paperboard	31531	11560	3631	1289	5489	1955	50611	70.8
Convtd Paper&Paperbd Products	106591	338196	13310	38210	13167	36133	141115	31.3
Paper Products, Total	82059	307245	11228	34638	11113	31190	114661	23.0
Paperboard Products, Total	14532	30851	2082	4571	2054	4943	26454	85.8
Wet machine Board	1842	1238	259	228	231	158	3484	98.3
Construction Paper & Board	419515	86961	48189	10126	48501	10384	500255	20.4
Notes								
Other: No Weight Avail. ($000)		135346		15154		15187	143018	5.1
Total Imports Incl. Other($000)		5344649		490959		474884	5438225	+1.8

EXPORTS

							(1)	
Pulpwood, Roundwood (cords)	111682	7475	4081	283	9837	700	62551	-48.7
Pulpwood Chips	2860133	231140	286382	15448	167639	11138	2677333	-10.2
Total All Exports	9872289	4315138	911262	354338	948355	360249	10724582	6.8
Wood Pulp,Total	3394848	1414558	288798	113465	328512	118024	3581684	2.6
Cotton Pulp and Other Pulp	104580	72327	3578	4143	11650	6864	98947	-7.7
Waste and Old Paper	2127050	238934	236526	28405	221588	26908	2423524	13.4
Paper, Board & Products,Total	4246041	2589319	380362	208325	386825	206453	4609447	7.4
Paper,Paperboard,Wet Machine Bd. & Construction Paper & Board	3670413	1754352	330782	142823	335890	140317	4036781	7.5
Paper, Prbd & Prod ex Cnst&WMB	4187119	2558943	374687	205808	382068	204221	4542205	7.3
Paper & Paperboard, Only	3611491	1723877	325117	140308	331235	138285	3969538	7.4
Paper, Total	840445	679068	59808	47827	58370	47889	782011	-12.5
Newsprint	307857	142984	22453	8084	24322	10522	284585	-8.7
Printing & Writing	246817	239135	16505	18503	16538	18441	198741	-22.3
Uncoated Groundwood	55816	48430	2847	2783	2527	2404	36813	-42.2
Clay Coated Paper	81373	65485	6446	4875	7418	5808	78420	-5.4
Uncoated Free Sheet	70599	75451	4730	5823	4683	5643	58801	-17.5
Other Printing & Writing	38728	49769	2482	3020	1931	2588	26707	-33.5
Total Pkg. & Other Paper	262881	271556	19034	20479	17376	18888	271081	-4.9
Unbleached Kraft	89068	38003	8228	2803	7446	3090	116375	25.6
Other Pkg. & Indust. Paper	173783	233553	10808	17576	9830	16788	154718	-19.6
Tissue	23310	25415	1616	1751	1133	1038	16584	-33.1
Paperboard, Total	2771048	1044808	265508	82481	271865	90385	3187327	13.7
Solid Wood Pulp	2612568	870814	247058	84252	261128	85232	3027808	14.3
Total Linerboard	1898193	542304	190375	48431	210848	55058	2289500	19.8
Bleached Kraft Linerboard	67595	26828	17909	7358	19861	7454	144843	133.8
Unbleached Kraft Linerbd	1818588	515677	172466	42073	190987	47805	2144658	18.0
Other Unbleached Kraft	138218	60780	8122	3328	10482	4522	108835	-26.8
Other Bleached Kraft	525733	348815	45404	30150	37652	25012	553487	5.9
Semi-Chemical Corrugating	61422	18116	5158	1342	2184	839	78274	29.3
Recycled Paperboard	158478	74084	18450	6228	10738	5183	158821	4.8
Convtd Paper&Paperbd Products	575828	834866	48581	65502	50835	85936	572888	6.3
Paper Products, Total	315805	581163	25218	46363	27780	46868	309140	-3.1
Paperboard Products, Total	259823	243804	24363	18139	23045	19967	263927	18.9
Wet Machine Board	11088	5939	580	362	504	334	11853	9.2
Construction Paper & Board E	47833	24437	5075	2153	4251	1898	55390	14.0
Notes								
Other: No Weight Avail. ($000)		8990		1013		753	7780	-19.7
Total Exports Incl. Other($000)		4324128		355352		361002	4175083	-3.4

SOURCE: Bureau of Census, U.S. Department of Commerce. E - Incl. estim. of tonnage based on square foot data.
(1) Annual Rate Year-To-Date is in tons unless otherwise specified in item description.

PRODUCER PRICE INDEXES
1967 = 100

	81	82	JULY	AUG.	SEPT	OCT.	Annual Rate Y-T-D 83	% Change from same Period Last Year
Pulp, Paper and Products except Building Grades	270.8	273.2	269.9	270.1	271.7	273.0	269.8	-1.6
Pulp Paper & Products, ex. Building Grades & ex Waste Paper #	272.4	275.9	272.5	272.7	274.3	275.7	272.4	-1.6
Total Wood Pulp	397.1	379.1	347.5	348.2	348.4	348.8	345.9	-10.3
Total Paper	279.8	286.3	281.7	281.0	285.3	286.6	280.8	-2.4
Total Paper, exc. Newsprint	271.1	278.3	274.8	273.5	280.3	282.6	275.0	-1.4
Newsprint	307.5	315.8	306.3	305.8	309.6	309.6	302.6	-5.1
Total Paperboard	258.1	254.9	249.5	250.4	252.8	255.5	248.8	-3.1
Total Paper and Paperboard #	273.1	276.5	271.6	271.4	275.1	276.8	270.8	-2.6
Converted Products	258.8	264.4	264.5	265.0	265.3	266.5	264.9	0.2
Waste Paper	175.7	121.1	116.0	116.0	116.0	116.0	116.0	-5.0
All Commodities	293.4	299.3	303.2	304.9	305.3	306.3	302.6	1.2
Industrial Commodities	304.1	312.3	316.6	317.5	317.2	318.7	315.3	1.1

SOURCE: Producer Price Indexes -Bureau of Labor Statistics, U.S. Department of Labor # Computed by API

Continued from Page 2

production showed a remarkable 39% gain. Panelboard is used largely in automobiles and mobile homes; both these markets are showing strong increases over year-ago levels.

Among the major packaging grades, the strongest increase has been in containerboard production. Containerboard production for domestic use was up 9.1%, reflecting a 10.5% increase in kraft linerboard and a 6.5% increase in the production of semichemical paperboard. While recycled linerboard is running slightly below year-ago levels, recycled corrugating medium is up about 14%. These gains in containerboard production for domestic use compare to the increases in shipments of fiber boxes. The Fiber Box Association showed January-October 1983 shipments up 6.8%, with the 1983 total pointing to 253 billion square feet, compared to the record high of 251 billion square feet in 1979.

Boxboard production for domestic use surged in October, bringing the year-to-date gain to 4.5% over the comparable year-ago total. This compares to the 3.3% gain registered in the first nine months of 1983. Although the production of these grades in 1982 was fairly low, the 1983 gains are nonetheless startling. For example, clay coated folding boxboard in October 1983 was 19% above its year-ago level, while clay coated recycled paperboard showed a 22% gain. For the ten months as a whole, the solid bleached grades

Continued on Page 11

Continued from Page 10

were up 6%, while the recycled grades showed a 4% increase. Even set-up boxboard, which is normally a slow growth grade, gained 5% in the first ten months of 1983 relative to its corresponding 1982 total, with the October 1983 rate 24% over October 1982. Among the other bleached board grades, the strongest market has been cup stock, up 13% in the first ten months of 1983.

Production of total recycled paperboard, reflecting the strength in non-packaging uses as well as in the major packaging grades, is pointing to a 7.2 million-ton total, which would be the highest total since 1978-1979, when production was in the neighborhood of 7.5 million tons per year. Tube, can and drum stock made from recycled paperboard is showing a 16.7% increase over its year-ago total, with the 1983 level moving to about one million tons. This would be a record and 10% over the previous highs established in 1973 and again in 1979.

Production of paperboard for export has also been remarkably strong. At 2.2 million tons per year, production of kraft linerboard for export in the first ten months of 1983 was 12% over the 1982 level and second only to the 1980 high of 2.4 million tons. The 1982 total of 1.9 million tons was the second highest total.

Fibrous Materials

Production of chemical paper grade market pulp in the first ten months of 1983, at about 5.2 million tons per year, was 10.5% above its year-ago total. Shipments rose by 12.4%, with shipments to the domestic market up 15%, and for export up 10%. Exports to Western Europe, the largest market for U.S. pulp rose by 6%. However, exports from the Scancinavian country to this market showed a much stronger gain, largely reflecting the effects of the high value of the dollar relative to the Scandinavian currencies. U.S. exports to Japan, by way of contrast, showed a 34% gain; exports to other markets rose 8%.

Production of dissolving grades of wood pulp is showing a strong recovery, with the January-September rate some 11% over the year-ago level. However, the 1982 decline in dissolving pulp production was so strong that the 1983 rate is still some 8.6% below that of 1981.

The strength in dissolving pulp production in 1983 largely reflects increases in shipments to the domestic market. Data available for the first ten months of the year show shipments to the U.S. market up 21% from the year-ago level, while exports are just about matching their 1982 rate.

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Import/Export Summary

Imports of paper and paperboard in September 1983, at 682,000 tons, were well within the range established in earlier months of the year; aside from February, when imports dropped to 514,000 tons, imports ranged from a low of 642,000 to a high of 779,000 tons - the latter reached in June.

Newsprint, of course, forms the major part of the import total; at 6.7 million tons per year, January-September imports of newsprint were 3.7% ahead of their year-ago level. This compares to the 5.1 million-ton per year domestic production rate, which was less than 1% ahead of its 1982 level. Newsprint exports, at 295,000 tons per year, were down nearly 10%, so that the total newsprint new supply in the first nine months of 1983 was 2.8% over its comparable year-ago level, a little above the gain in real GNP.

The strength in demand for printing/writing papers was also reflected in imports of these grades. In the first nine months of 1983 imports of printing/writing papers were above the million-ton per year rate, 42% over the comparable year-ago rate. The major tonnage gains were in the uncoated groundwood grades, which showed a 40% increase. With production of these grades up 3% and exports down 42%, new supply - at 2.1 million tons per year - was 12% over its comparable 1982 level. Thus the increase in demand for groundwood papers was in line with the increase in demand for the other printing/writing papers. In the case of groundwood papers, however, imports accounted for over 30% of the total new supply. Imports accounted for only a very minor part of the total new supply of the other printing/writing paper grades.

Capacity

The American Paper Institute has just released the 1983 edition of its annual Capacity Survey. Reports have already been mailed to its members; the subscription price for non-members is $225.00.

The survey shows that total paper and paperboard capacity will increase at an average rate of 1.5% per year in the 1984-1986 period, compared to 2.1% in the 1968-1983 period. Among the paper grades, the major gains will be in printing/writing and tissue grades. The paperboard grades of unbleached kraft and solid bleached kraft paperboard will show the largest increases.

Wood pulp capacity in the 1984-1986 period is expected to grow 1.4% per year, compared to 2.2% per year in the preceeding 16 years. The sulphate and mechanical pulp grades are expected to increase at an average rate of 1.7% per year during the 1984-1986 period.

INDUSTRY FACT SHEET

AMERICAN PAPER INSTITUTE, INC.
260 Madison Avenue
New York, New York 10016

NOV. 21, 1983

PRODUCTION (000 TONS)

	Oct. 83	Sept 83	Oct. 82	Jan - Oct. 83	Jan - Oct. 82	% Change 83/82
PAPER GRADES	P	R				
Newsprint	448	415	448	4297	4267	0.7
Printing & Writing	1564	1462	1380	14408	13074	10.2
Uncoated Groundwood (s)	142	132	140	1251	1218	2.8
Coated Paper (s)	527	485	447	4726	4202	12.5
Uncoated Free Sheet Paper (s)	767	722	684	7230	6557	10.3
Thin Paper (s)	29	26	28	278	274	1.6
Cotton Fiber Paper (s)	14	11	10	106	100	6.0
Bleached Bristols (s)	86	86	71	816	724	12.8
Tissue Paper	420	397	392	3981	3686	8.0
Total Pkg & Other Paper	507	492	458	4670	4426	5.5
Unbleached Kraft Packaging & Indl. Converting (s)	338	327	319	3161	3070	3.0
Other Paper *	169	165	139	1509	1356	11.3
TOTAL PAPER	2939	2766	2677	27356	25453	7.5
PAPERBOARD GRADES						
Unbleached Kraft Paperboard	1439	1420	1269	13478	12272	9.8
Unbleached Kraft Linerboard	1344	1324	1183	12560	11370	10.5
Other Unbl. Kraft Paperboard	96	96	86	918	903	1.7
Semichemical Paperboard	423	395	381	3927	3688	6.5
Bleached Paperboard	348	309	298	3253	3099	5.0
Recycled Paperboard	678	611	570	6023	5489	9.7
TOTAL PAPERBOARD	2888	2735	2518	26681	24547	8.7
TOTAL PAPER AND PAPERBOARD	5827	5501	5195	54037	50000	8.1

WOOD PULP (ALL GRADES)	Sept 83	Aug. 83	Sept 82	Jan - Sept 83	Jan - Sept 82	% Change 83/82
Dissolving & Special Alpha	91	99	79	927	832	11.4
Bleached Sulfite	113	108	95	973	954	2.0
Unbleached Sulfite	24	26	29	233	258	-9.7
Bleached & Semi-Bl. Sulfate	1690	1811	1565	15722	14904	5.5
Unbleached Sulfate	1754	1679	1494	14646	13781	6.3
Semichemical	318	328	303	2868	2829	1.4
Groundwood and Thermomechanical	428	432	426	3750	3821	-1.9
TOTAL PULP DIVISION DATA	4418	4483	3992	39118	37379	4.7

(s) - Shipments R - Revised E - Estimate
P - Preliminary * - Revised series based on A.P.I. data.

November 29, 1983

	Full Year		INDUSTRY DATA			Ann. Rate Year - To - Date	% From Same Pd. Last Yr.
			R	R	P		
PAPER AND PAPERBOARD -- Tons (000)	1981	1982	August	September	October		
Total Production (API)..... excluding	62282	59488	5676	5501	5827	64844	8.1
Total Seasonally Adjusted.... construction			5481	5742	5618	64283	8.1
Imports (including Products) .E and wet	7941a	7603b	721	685	N.A.	8291	9.1
Exports (including Products) .E machine	4561a	4187a	375	382	N.A.	4544	6.8
Apparent Consumption..... grades	65842a	62904a	5807	6055	6004	68030c	+8.3
Paper Production % Tonnage Capacity.....	92.1	87.7	94.6	92.2	95.0	91.8mh	-
Paperboard Production % Tonnage Capacity.....	90.6	81.9	88.6	91.3	93.9	88.4m	-
			July	August	September		
IMPORTS..... Including Construction and	8339	8024	702	787	741	8686	9.5
EXPORTS..... WMB Grades (excl. HPB)	4641	4246	412	380	387	4609	7.4
MARKET WOOD PULP PRODUCTION - Tons (000).....	6210	5732	493	566	533	6414	10.1
TOTAL WOOD PULP PRODUCTION - Tons (000)..(F)....	52041	48333	4156	4483	4418	52157	4.7
WOOD PULP IMPORTS - TONS (000).....	4087	3656	327	350	332	3941	8.9
WOOD PULP EXPORTS - TONS (000).....	3678	3395	259	289	328	3592	2.6
RAW MATERIALS CONSUMPTION - Tons (000)			July	August	September		
..PAPER AND BOARD MILLS excluding			4059	4375	4347	50738	4.5
Wood Pulp..... consumption For	50698	48120	1128	1205	1188	14193	5.4
Waste Paper..... construction &	13875	13525	5187	5580	5535	64931	4.7
TOTAL..... WMB grades	64573	61645	6801	7395	7203	85200	7.8
PULPWOOD CONSUMPTION Cords(000) Amer. Pulpwd. Assn	79747	79039					
EMPLOYMENT (000)			August	September	October		
Paper and Allied Products.....Total.....	688.5	662.0	663.4	665.0	667.5	656.8	-1.0
Pulp, Paper and Board Mills.....Total.....E	267.3	257.8	254.2	254.0	255.0	253.1	-2.0
AVERAGE HOURLY EARNINGS OF PRODUCTION WORKERS ($)							
Paper and Allied Products.....	8.60	9.32	10.02	10.09	10.07	9.87	6.5
Pulp, Paper Mills..... .....E	10.05	10.88	11.85	12.01	12.00	11.62	7.6
Paperboard Mills.....E	10.23	11.13	12.32	12.32	12.32	12.02	8.0
			1983 Q1	1983 Q2	1983 Q3		
CAPITAL EXPENDITURES, PAPER & ALLIED PRODUCTS (Rept. by US Dept. of Com., Ann. Rates, Bill.$)e	6.72	5.37	6.02	6.30	6.05	6.19y	3.7
INDEX OF OUTPUT PER MAN-HOUR (1977=100).....			August	September	October		
IN PULP, PAPER ...Production Workers.....	108.2	108.9	123.4	125.7	123.9	121.0	10.3
AND BOARD MILLS ...All Employees.....	107.5	108.3	121.7	124.7	122.9	119.3	10.3
PAPER AND ALLIED PRODUCTS (Million $)			July	August	September		
Industry Shipments (Dept. of Commerce)e.....	80251	78892	7124	7307	7393	83918	6.1
Pulp, Paper and Paperboarde.....	35116	33523	3051	3086	3180	35628	5.5
Inventories (End of Period) - Total Industrye.	8841	8607	8334	8381	8510	8510	-1.7
Pulp, Paper and Paperboarde.....	3224	3365	3242	3211	3215	3215	-5.2
			1982 Q4	1983 Q1	1983 Q2		
Sales (Corporations Only, FTC).....	62699	60293	14839	15324	16500	64048	5.2
Earnings (Corporations Only, FTC).....	3110	1460	198	441	543	1968	15.2
Depreciation (Corporations Only, FTC).....	2267	2379	595	641	661	2804	10.2
Net Worth (Corporations Only, FTC).....	26558	26705	26705	26895	26856	26856	-0.2
PRICE INDEXES (Bureau of Labor Stats)1967=100			August	September	October		
Pulp, Paper & Products, ex. Building Grades...	270.8	273.2	270.1	271.7	273.0	269.8	-1.6
Wood Pulp.....	397.1	379.1	348.2	348.4	348.6	345.8	-10.3
Waste Paper.....	175.7	121.1	116.0	116.0	116.0	116.0	-5.0
Paper.....	279.8	286.3	281.0	285.3	286.6	280.8	-2.4
Paperboard.....	258.1	254.9	250.4	252.8	255.5	248.8	-3.1
			August	September	October		
PAPER DEMAND (INDEXED: 1967=100)							
Total Paper Production e.....	148.3	145.4	161.6	164.8	162.7	155.9	7.5
Paper New Supply e.....	137.7	135.1	151.7	152.6	153.9	145.6	8.2
Total End - Use Index e.....	150.3	148.5	161.1	161.0	164.9	155.9	4.2
Production of Nondurable Goods e...(19%)..	164.7	156.1	172.5	173.8	174.6	168.5	6.6
Disposable Income (Constant $) e...(23%)..	154.3	157.8	164.0	165.2	166.8	162.6	3.3
Total Printing and Publishing e...(58%)..	144.0	144.0	158.3	158.6	160.9	148.7	3.7
Trend Factor			Not Available				
PAPERBOARD DEMAND (INDEXED: 1967=100)							
Total Paperboard Production e.....	137.1	127.6	138.8	150.7	146.2	138.6	8.7
Production for Domestic Use	132.9	122.7	133.2	145.6	142.9	133.1	8.6
Total End - Use Index e.....	149.3	139.5	153.1	155.0	155.8	147.5	5.3
Production of Consumer Goods e...(60.48%)	147.8	142.7	156.1	157.8	158.2	150.8	5.6
Production of Equipment e...(6.62%)	151.8	139.8	143.1	145.1	147.8	139.0	-1.3
Production of Materials e...(32.89%)	151.5	133.7	149.6	151.7	153.0	143.2	6.2
Trend Factor			Not Available				
			July	August	September		
NEWSPRINT MARKETS							
Consumption by Publishers - Tons (000).....	11205	11150	900	933	976	11257	3.7
Newspaper Pub. and Printing Empl. Total(000)..	419.8	417.5	422.8	422.7	424.6	419.3	0.4
PRINTING AND FINE PAPER MARKETS							
MAGAZINE ADVERTISING PAGES (LNA, Inc.).....	123182	120751	8867	8483	12509	123330	7.0
WHOLESALERS SALES AND INVENTORIES (Million $)(J)							
Total Paper & Pap. Prdcts..ex Wallpaper..Sales	23603	22776	1865	2184	2246	24088	5.7
Inventories (End of Period)	1971	1885	2070	2201	2244	2244	15.8
			August	September	October		
FIBRE BOX DATA (Fibre Box Association)							
Fibre Box Shipments (Million square feet).....	248152	235185	22881	22327	23476	254224	6.8
Container'bd Inventory at Mill & Plant(000Tons)	2729	2584	2421	2339	2300	2300	-5.1
RETAIL TRADE (Million $)							
Total Retail Sales e.....	1047118	1074467	97801	99111	100173	1159875	8.6
Nondurable Goods Stores Sales e.....	731201	753568	66908	67139	67284	789227	5.1
GENERAL ECONOMIC DATA							
TOTAL INDUSTRIAL PRODUCTION (INDEX 1967 = 100)e.	150.9	138.6	151.7	153.6	154.8	145.9	4.7
PRODUCER PRICES(ALL COMMODITIES)(INDX 1967=100).	293.4	299.3	304.9	305.3	306.3	302.8	1.2
CONSUMER PRICES (ALL ITEMS) (INDEX 1967 = 100)..	272.4	289.1	300.3	301.8	302.6	297.4	3.2
			July	August	September		
TOTAL CONSUMER CREDIT OUTSTANDING - (Billion $).	331.7	344.8	358.0	363.7	367.6	367.6	8.9
			1983 Q1	1983 Q2	1983 Q3		
GROSS NATIONAL PRODUCT - ANNUAL RATE (Billions).							
G.N.P. or Expenditure - Current $.....	2954.1	3073.0	3171.5	3272.0	3360.3	3267.9	6.8
G.N.P. or Expenditure - 1972 $.....	1513.8	1485.4	1490.1	1525.1	1553.6	1522.9	2.4

lb/capita
Pap&Papbd Othr Totl Popul(mil)
.a - 372 + 21 = 393 229.8
.b - 343 + 15 = 358 232.0
.c - 382 + 18 = 400 233.6
.E - Last month estimated by API
.e - estimated by API

a - Adjusted for holiday shutdowns
b - Adjusted to conform with API Division data
j - Census unpublished data; standard dev. = 6-8%
N.A. - Not Available
P - Preliminary
Q - Quarter

R - Revised
RS - Revised Series
y - Full year estim. by U.S. Dept. of Com.
e - Seasonally Adjusted